# HOME-START MALDON WEBSITE

# EXPENSES FORM COMPLETION

# USER GUIDE

Version:        0.1 Draft

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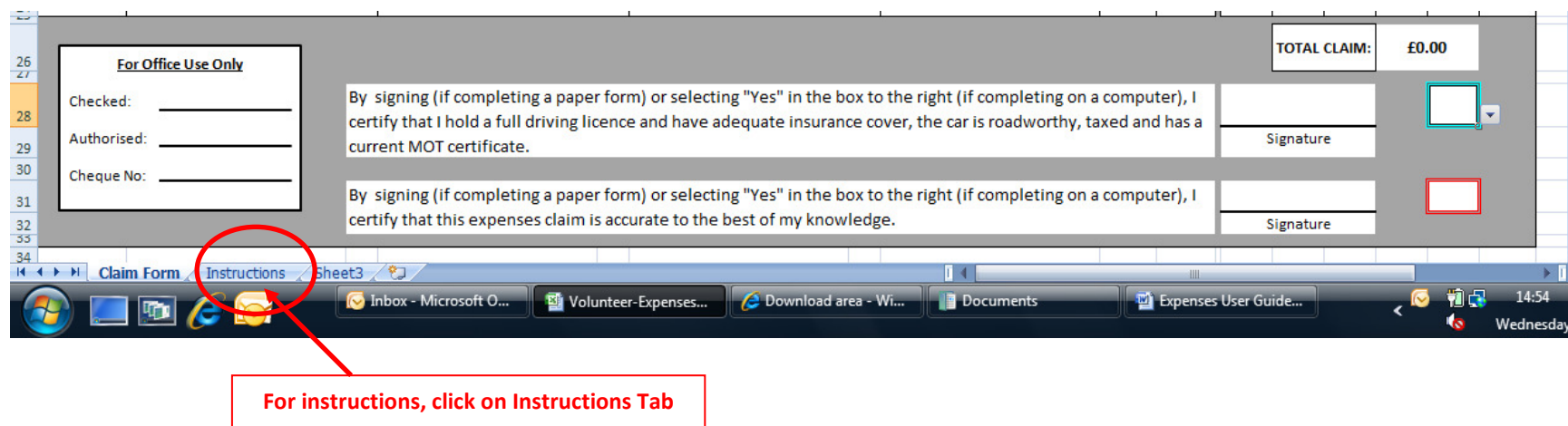Date:        6th October 2010

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# COMPLETING THE EXPENSES FORM

- Once the expenses form has been downloaded from the Home-Start Maldon website it can be used in two ways:

  - It can be printed off and completed by hand and taken or sent into the Home-Start office

    **OR**

  - It can be completed on your computer and submitted electronically or printed off once completed and then sent or taken into the office.

    **N.B. If you have paper receipts that require attaching with the expenses form, the form will need to be printed off and sent or taken into the Home-Start office .**

- There are a number of benefits to completing the form on your computer:
  - Once you put in your mileage, the form will automatically calculate the amount of your claim
  -  The form will automatically add up all of your claim amounts and provide sub totals and totals
  - You can save a copy to your computer so you have a copy for your own records
  - You can submit the form to the Home-Start office electronically (details of how to do this can be found in the volunteer downloads user guide).

- Instructions as to what information should be entered into which fields can be found on the "Instructions" tab. This is shown in the picture below



**For instructions, click on Instructions Tab**

**Enter Name, Month, Year**

**Enter Mileage**

**Phone, Parking & Other expenses**

**Tick apropriate "Role" box**

**Use scroll bar to scroll up and down the form**

**Sub Totals and Totals automatically calculated**

**Click on Instructions tab to see completion instructions**

**Use scroll bar to scroll left & right**

Microsoft Excel - Volunteer-Expenses-Form-Excel-2007-Version [Read-Only] [Compatibility Mode]

## HOME-START MALDON - MILEAGE AND EXPENSES FORM

| NAME | | | MONTH: | | YEAR: | | | EXPENSES CATEGORY | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ROLE | Volunteer | | | | Co-ordinator | Committee | | Other | | | |

**MILEAGE EXPENSES** (Mileage for employees to be calculated from Home-Start office) — **Other Expenses** — Please list each item separately and attach any receipts to this form.

| VEHICLE | Car (Tick Box) | Motorbike (Tick Box) | Other (please state) | Enter "other" form of vehicle here | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Date | Start of Journey | Destination | End of Journey | Reason for Journey/Description of item (if not mileage) | Mileage | Mileage | Phone | Parking | Stationery | Other1 | Other 2 | Totals |

| Date | | | | | Mileage | Mileage | Phone | Parking | Stationery | Other1 | Other 2 | Totals |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| dd/mm/yy | | | | | | £0.00 | | | | | | £0.00 |
| dd/mm/yy | | | | | | £0.00 | | | | | | £0.00 |
| dd/mm/yy | | | | | | £0.00 | | | | | | £0.00 |
| | | | | | | £0.00 | | | | | | £0.00 |
| | | | | | | £0.00 | | | | | | £0.00 |
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| | | | | | | £0.00 | | | | | | £0.00 |
| | | | | | | £0.00 | | | | | | £0.00 |
| SUB TOTALS | | | | | 0 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 |

**TOTAL CLAIM:** £0.00

**For Office Use Only**

Checked: _____

Authorised: _____

Cheque No: _____

By signing (if completing a paper form) or selecting "Yes" in the box to the right (if completing on a computer), I certify that I hold a full driving licence and have adequate insurance cover, the car is roadworthy, taxed and has a current MOT certificate.

Signature

By signing (if completing a paper form) or selecting "Yes" in the box to the right (if completing on a computer), I certify that this expenses claim is accurate to the best of my knowledge.
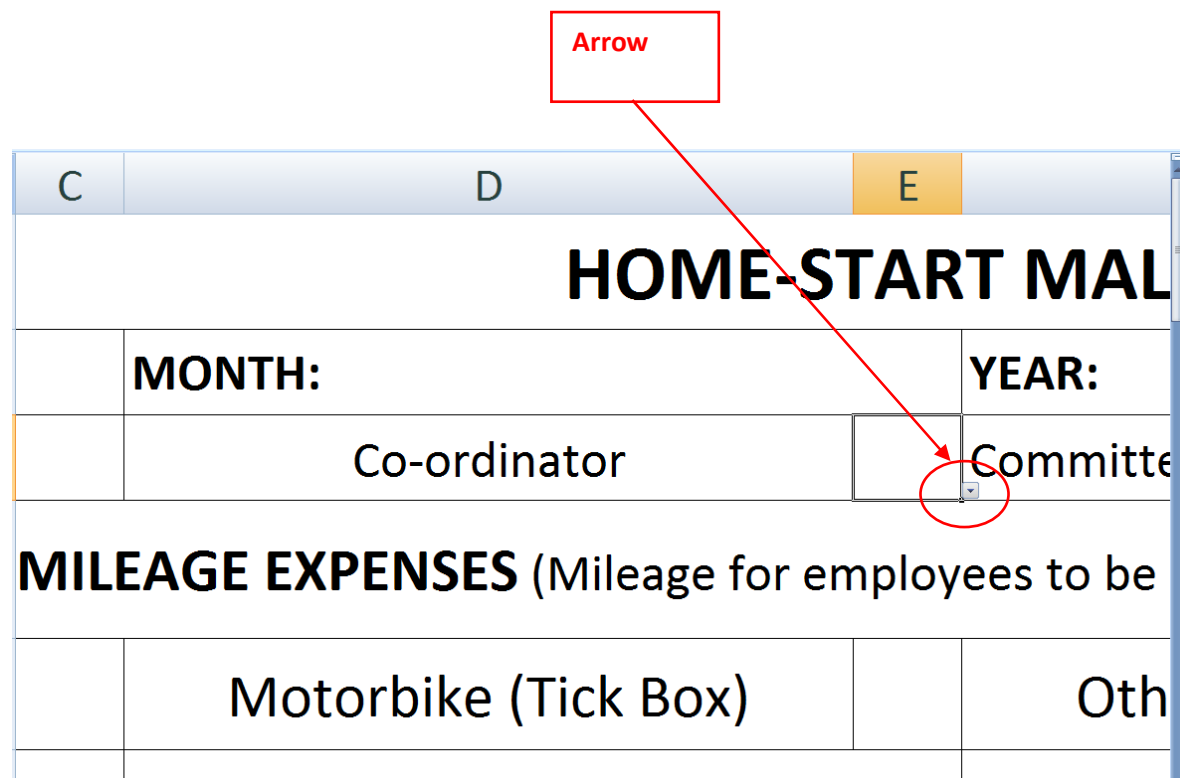
Signature

Claim Form | Instructions | Sheet3

# COMPLETING DROP DOWN BOXES

- If completing the form online, there are a number of drop down boxes to make completion of the form easier. These are:

  o Roles (i.e. Volunteer, Co-ordinator etc)

  o Vehicle type (i.e. Car, Motorcycle etc)

  o Certification boxes (car certification and vehicle certification). These replace the physical signatures if the form is completed and sent electronically.

- To complete the drop down boxes, click on the field and an arrow will appear

**Arrow**

| C | D | E |
|---|---|---|
| | **HOME-START MAL** | |
| | **MONTH:** | **YEAR:** |
| | Co-ordinator | Committe |
| | **MILEAGE EXPENSES** (Mileage for employees to be | |
| | Motorbike (Tick Box) | Oth |

- Click on the arrow and a selection list will appear. It will be either

  o a "tick" or a blank for the "Role" or "vehicle type" drop down boxes
  or
  o a "Yes", a "No" or a blank space for the certification drop down boxes.